

## DISTINCTIONS BETWEEN AND EXAMPLES OF PERSONAL AND PURCHASED SERVICES

| Personal Service Characteristics  | Purchased Service Characteristics  |
|---|--|
| <ul style="list-style-type: none"> <li>• Services are professional or technical in nature and meet more specialized needs. Work is predominantly intellectual and varied.</li> <li>• Work is independent from the day-to-day control of the agency; consultant maintains control of work methods.</li> <li>• Work requires regular exercise of judgment, discretion, and decision-making; involves providing advice, opinions, or recommendations; may have policy-implications for agency; often addresses management-level issues.</li> <li>• May require advanced or specialized knowledge, or expertise gained over an extensive period of time in a specialized field of experience.</li> <li>• Work may be original and creative in character in a recognized field of endeavor, the result of which may depend primarily on the individual's invention, imagination, or talent.</li> <li>• Consultant generally assumes risk of loss if the requirements are not satisfied.</li> </ul> | <ul style="list-style-type: none"> <li>• Services are more repetitive, routine, or mechanical in nature; following established or standardized procedures as contrasted with customary and regular exercise of discretion or independent judgment.</li> <li>• Services contribute to the day-to-day business operations of the agency, rather than the management or policy side of the agency, and may meet more general needs.</li> <li>• Services generally involve completion of an assigned task, rather than an entire project.</li> <li>• Decision-making and analysis, if required, is more routine or perfunctory in nature.</li> <li>• Services that are generally performed based upon agency direction.</li> </ul> |
| <p><b>NOTE:</b> The fact that a service possesses one of the above characteristics is not necessarily conclusive to a determination of personal or purchased service, but rather the service should generally fit the applicable criteria.</p>  |  |

# DISTINCTIONS BETWEEN AND EXAMPLES OF PERSONAL AND PURCHASED SERVICES

## Examples of Personal and Purchased Services:

The list below is a guide to assist agencies in determining whether a service is generally considered a personal service or a purchased service. Always carefully review the proposed services being required under the contract to make the final determination.

For example, a contract for conference coordination could be either personal or purchased service, depending upon the responsibilities of the contractor. If the contractor is independently responsible for organizing, implementing and coordinating the conference with only minimal guidance from the agency, the contract would be a personal service. If the contractor is following prescribed instructions and the agency has primary responsibility for coordination of the conference, the contract would be designated as a purchased service contract.

| <i>Examples of OFM Personal Services</i>  | <i>Examples of GA Purchased Services</i>  |
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| <ul style="list-style-type: none"> <li>• Accounting services</li> <li>• Actuarial services</li> <li>• Analysis and assessment of processes, programs, fiscal impact, compliance, systems, etc.</li> <li>• Appraisal services</li> <li>• Art work, original (services creating the art work)</li> <li>• Audio/video media productions (design, development and/or oversight of)</li> <li>• Auditing services</li> <li>• Business analysis and assessment services</li> <li>• Business process re-engineering</li> <li>• Communications (including design, development, or oversight of audio/video productions, brochures, pamphlets, maps, signs, posters, annual reports, etc.)</li> <li>• Conference and trade show management and coordination</li> <li>• Consultation on programs, plans, projects, systems, etc.</li> <li>• Counseling employees</li> <li>• Curriculum development</li> <li>• Economic analysis and consultation</li> <li>• Environmental Planning/Technology/Studies (except when small part of an architectural/engineering contract)</li> </ul> | <ul style="list-style-type: none"> <li>• Advertising in newspapers, magazines, billboards, etc.</li> <li>• Ambulance/emergency medical tech. service</li> <li>• Air/bus, vehicle charter/rental service</li> <li>• Auctioning service</li> <li>• Audiometric testing</li> <li>• Banking Services (routine, transaction based)</li> <li>• Boiler testing/water treatment service</li> <li>• Bookkeeping service (routine, transaction based)</li> <li>• Building alarm systems, service and repair</li> <li>• Check collection service</li> <li>• Clothing, textile fabrication repair service</li> <li>• Commercial laundry service, dry cleaning, etc.</li> <li>• Communications systems installation, servicing and repair</li> <li>• Conference Registration Assistance</li> <li>• Court reporting and transcription services</li> <li>• Credit card service</li> <li>• Debt collection service</li> <li>• Delivery/courier service</li> <li>• Document storage, duplication, retrieval, review and destruction service</li> </ul> |

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| <ul style="list-style-type: none"> <li>• Evaluation of processes, programs, projects, systems, etc.</li> <li>• Executive recruitment</li> <li>• Expert witness services for litigation/testimony</li> <li>• Facilitation for groups, projects, retreats</li> <li>• Facilities planning/coordination</li> <li>• Feasibility studies (except when small part of an architectural/engineering contract)</li> <li>• Financial services</li> <li>• Fund raising</li> <li>• Grant writing</li> <li>• Graphic design (creative or original in nature)</li> <li>• Guest speakers (includes honoraria)</li> <li>• Investigations (personnel related, etc.)</li> <li>• Investment advisors and management</li> <li>• Labor negotiations and labor relations services</li> <li>• Legal and paralegal services Legislative liaison services</li> <li>• Lobbying services</li> <li>• Management consulting</li> <li>• Marketing services, including identifying market opportunities, conduct of marketing programs, planning, promotion, market research surveys, etc.</li> <li>• Mediation, negotiation and arbitration services</li> <li>• Medical and psychological services, including evaluation and consultative services (For blood draws, physicals, blood pressure checks, etc., see Health Screening under purchased services.)</li> <li>• Needs assessment (except when small part of an architectural/ engineering contract)</li> <li>• Operational assessments</li> <li>• Organization development</li> </ul> | <ul style="list-style-type: none"> <li>• Drug testing and screening (standard tests)</li> <li>• Engraving service</li> <li>• Environmental monitoring: noise level, safety, hazardous gas detection, radiation monitoring service, etc. (using standardized processes)</li> <li>• Equipment installation, preventive maintenance, inspection, calibration and repair</li> <li>• Equipment rental services</li> <li>• Exam testing administration and scoring service</li> <li>• Firefighting/suppression service</li> <li>• Food preparation, vending and catering services</li> <li>• Health screening, basic diagnostic (wellness, blood pressure monitoring, blood draw, etc.)</li> <li>• Herbicide application service</li> <li>• Household goods packing, storage, transportation service</li> <li>• HVAC system maintenance service</li> <li>• Interpretive services: written/oral/sign language</li> <li>• Inventory service</li> <li>• Laboratory testing and analysis (standard tests only)</li> <li>• Land clearing/debris removal service (when not using heavy equipment)</li> <li>• Language translation service</li> <li>• Lay witness (called to testify in a court case)</li> <li>• Linen rental service</li> <li>• Marine equipment inspection, certification and repair</li> <li>• Medical equipment rental or repair service (wheel chairs, walkers, etc.) Includes measurements, adjustments and modifications to meet patient needs</li> <li>• Metal/pipe/wiring detection service</li> <li>• Office furnishings installation, refurbishment and repair service</li> <li>• Package inspection and crating</li> <li>• Painting service (unless public works)</li> </ul> |

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| <ul style="list-style-type: none"> <li>• Outreach services for programs</li> <li>• Peer review</li> <li>• Planning services (except when small part of an architectural/ engineering contract)</li> <li>• Policy development and recommendations</li> <li>• Productivity improvement</li> <li>• Program development, assessment, implementation, coordination, evaluation, etc.</li> <li>• Public involvement services and strategies</li> <li>• Public relations services</li> <li>• Publication development (See Communications)</li> <li>• Quality assurance/quality control services</li> <li>• Recommendations on processes, products, projects, systems, etc.</li> <li>• Recruitment, executive</li> <li>• Research services – social, environmental, technical</li> <li>• Retreat and workshop planning, conduct, coordination</li> <li>• Scientific and related technical services</li> <li>• Strategic planning</li> <li>• Speech and report writing</li> <li>• Statistical analysis</li> <li>• Studies, development and conduct</li> <li>• Surveys (including development of instrument, conduct and analysis of results – if conduct only of standard survey instrument, would be purchased service)</li> <li>• Temporary employment service for professional services: architects, engineers, registered nurses, doctors, etc.</li> <li>• Trade development services</li> <li>• Training – when it is: (a) offered to specific categories or classes of employees; (b) offered to all or most agency employees six times or less in a fiscal year</li> </ul> | <ul style="list-style-type: none"> <li>• Paper shredding</li> <li>• Parking lot sweeping/snow removal service</li> <li>• Pest/weed control service</li> <li>• Photographic/micrographic processing and delivering, includes aerial and ground photography (if analysis is included, then personal service)</li> <li>• Printing/duplicating service</li> <li>• Process serving</li> <li>• Property management (rent collection, property maintenance, etc.)</li> <li>• Recycling/disposal/litter pickup service</li> <li>• Security/armored car services</li> <li>• Shop welding/metal fabrication service</li> <li>• Steam cleaning, high pressure washing, parts cleaning service</li> <li>• Studio photography service (does not include portrait painting)</li> <li>• Subscription services</li> <li>• Telephone interview service (conduct of survey using prescribed survey instrument)</li> <li>• Temporary employment service (clerical support, dictation, word processing, bookkeeping, etc.)</li> <li>• Test fishing service</li> <li>• Towing service</li> <li>• Training – when it is offered on a recurring basis (more than six times per fiscal year) to all or most employees. Also includes existing satellite down-link courses and teleconferencing training services</li> <li>• Travel service – air, surface, water</li> <li>• Tree topping (when not using heavy equipment)</li> <li>• Utility services: garbage, fire protection, heat and sewer, cable TV, power, water, etc.</li> <li>• Vehicle inspection, lubricating and repair services</li> <li>• Videotaping and recording service</li> <li>• Warehouse dry/cold storage rental service</li> <li>• Weather information service</li> </ul> |